

Systems Integration Meeting

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SYSTEMS
INTEGRATION
MEETING
MAY 25, 1992



Systems Integration Meeting

Munich
25 May 1992

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Systems Integration Programme—Europe

Systems Integration Meeting

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Evolution of the Systems Integration Market

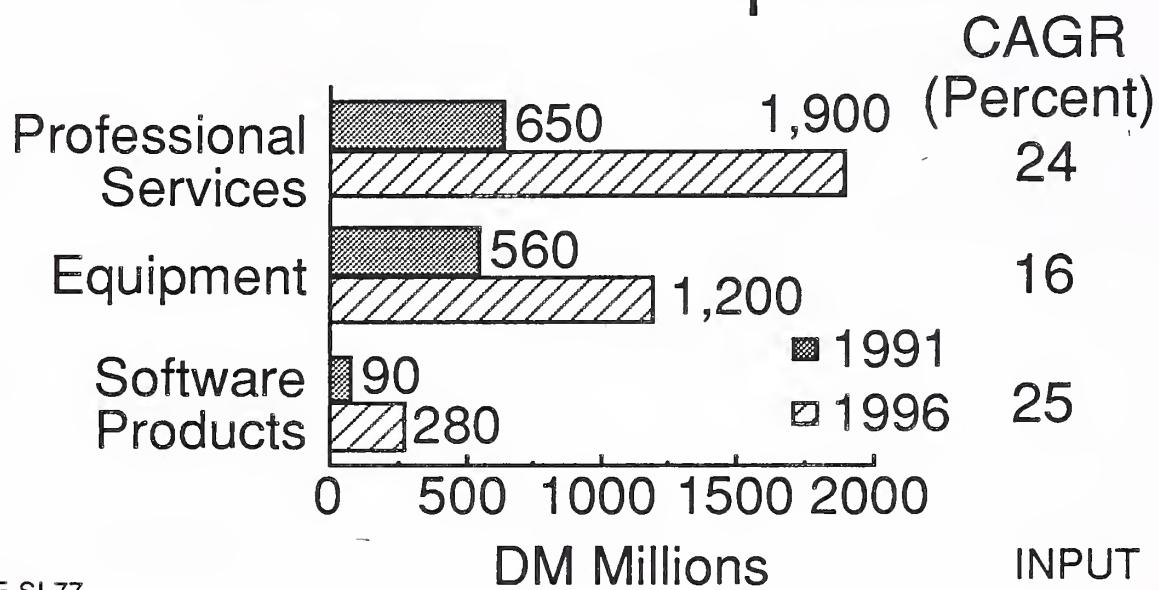
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Notes

Systems Integration, Germany

Market Development

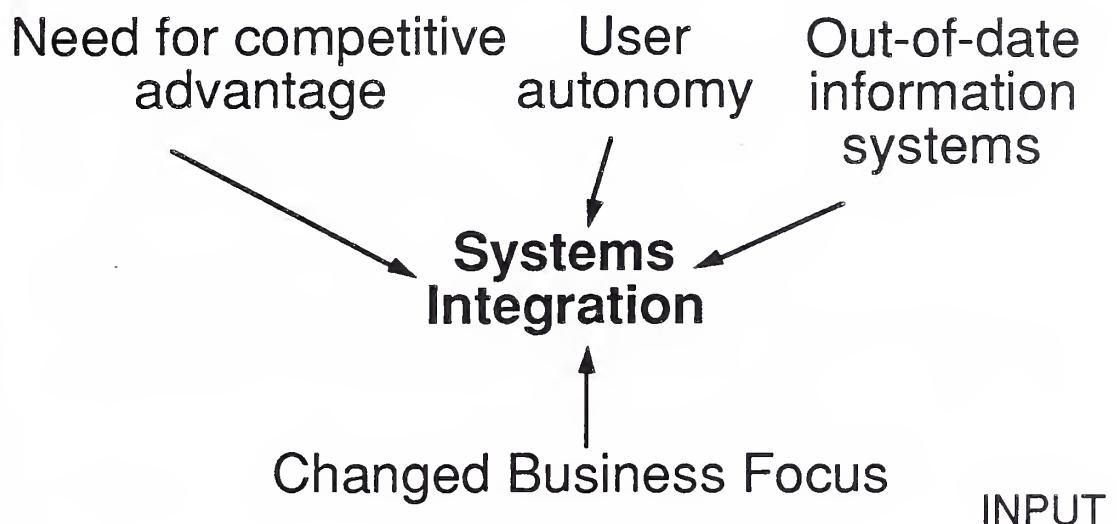


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Notes

Systems Integration, Europe

Driving Forces



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Notes

Systems Integration, Europe

Vendor Targeting

- Major organizations
- Industries undergoing radical change
- Companies with highly distributed operations

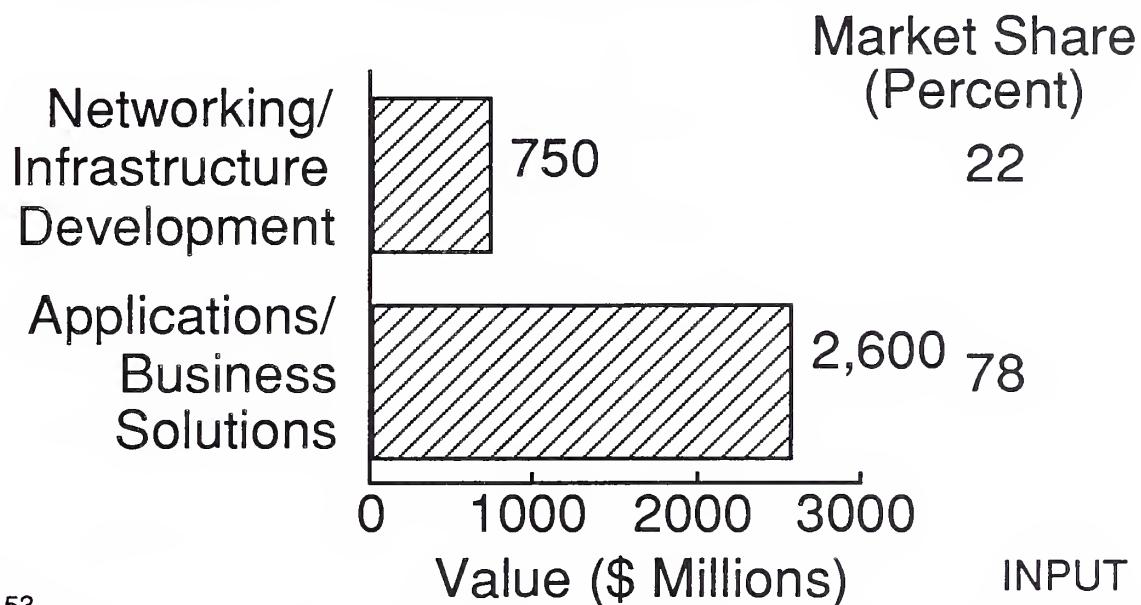
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Notes

Systems Integration, Europe

Market Segmentation, 1991



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Notes

Expanding Role of the Network



1990s

- Network becoming
 - The application driver
- New ways of doing business

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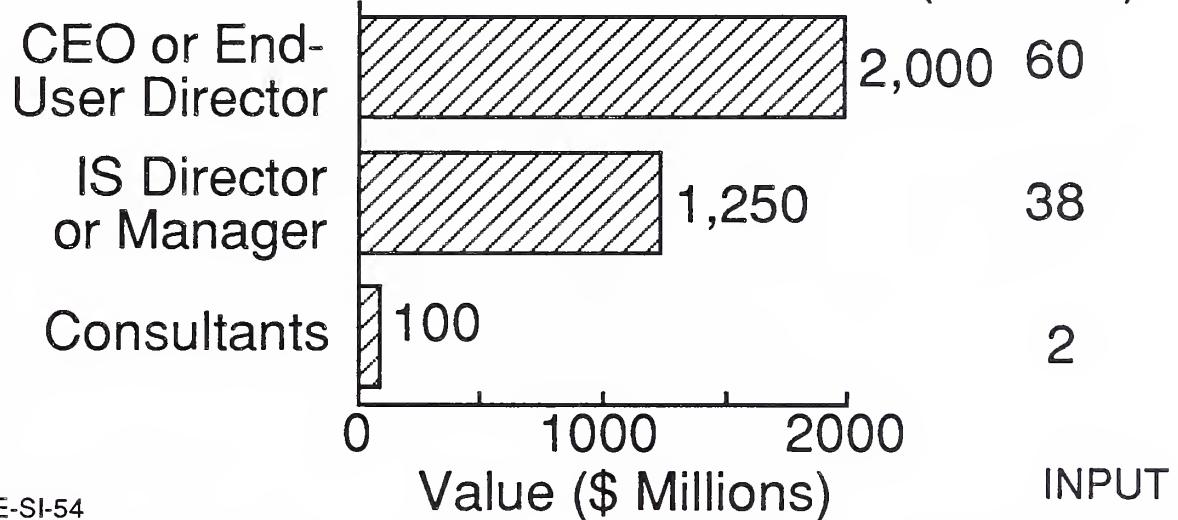
Notes

Systems Integration, Europe

Major Purchasing Influence

1991

Market Share
(Percent)



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Notes

Systems Integration, Europe

Factors in Vendor Selection

Nature of Project	Key Factors
Systems integration	End-user selection
	Top management influence
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Notes

Systems Integration, Europe

Factors in Vendor Selection

Nature of Project	Key Factors
Professional services	Experience of vendor Detailed evaluation of capabilities Location

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Notes

Revolutions or Evolutions?

- Re-engineering
 - Organization: All or parts
 - IS Organization

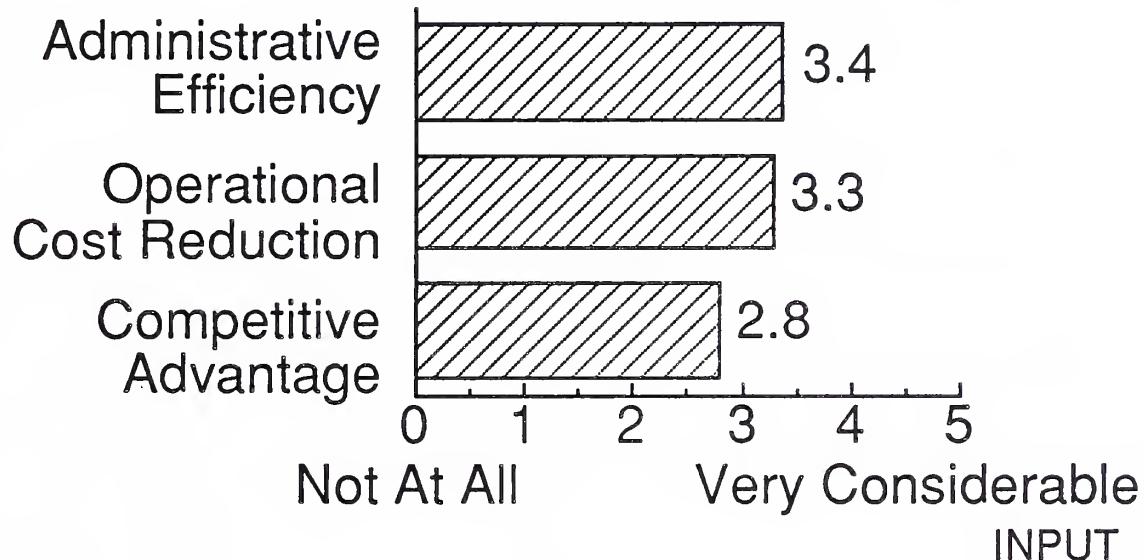
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Notes

Europe

IS Contribution During 1980s



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Notes

Key Skills—Business Process Re-engineering

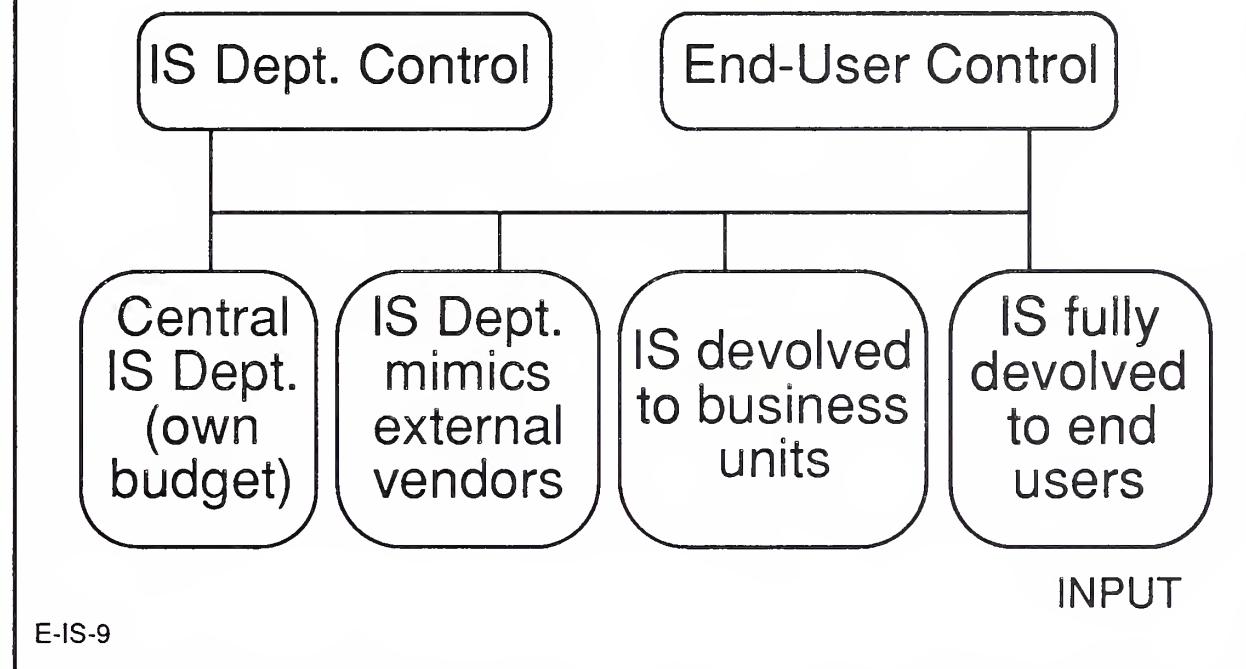
- Deliver competitive advantage
- Business process re-design
- Change management

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Notes

Control of IS



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Notes

Changing Role of IS Department

Control of Major Projects



Vendor Management Role

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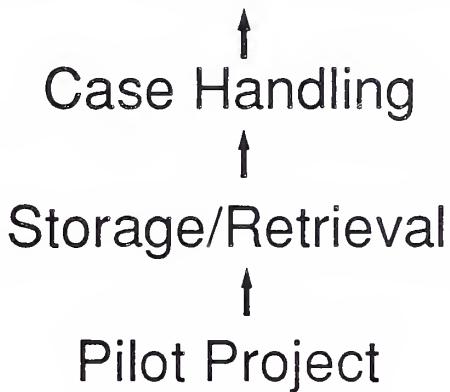
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Notes

Europe

User Evolution Imaging Systems

Integration with Data and Office Systems



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Notes

Role of Applications Software Products

- Key building blocks
- Ownership vs. partnership
- Perception of choice
- Importance of market position

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Notes

Systems Integration, Europe

Types of Agreement

One-off Project



Heads of Agreement



Equity Participation

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Vendor Selection Criteria

- Strategic advice capability
- Industry knowledge
- Ability to offer applications software product approach
- Experience/suitability of consultants

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Systems Integration, Europe

Strategic Trends

- Business consulting
- Formation of long-term consortia
- Importance of product branding
- Open systems as competitive weapon
- Need for key partners

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Notes

Systems Integration, Europe

Vendor Challenges

- Access to key decision makers
- Developing consultative approach
- Managing organizational changes
- Building key partnerships
- Strengthening industry knowledge

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Vendor Strategies in the Systems Integration Market

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Systems Integration, Europe

Leading Vendors, 1990

Vendor	Revenues (\$M)
CGS	330
IBM	320
Andersen	300
SNI	110
Logica	90

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Notes

Systems Integration, Germany Leading Vendors, 1990

Vendor	Revenues (DM)
SNI	130
IBM	120
Andersen	65
CGS	40
Unisys	30

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Notes

Andersen Consulting

Focus	Business process Re-engineering
Strengths	Business credibility Development methodology Advanced technology
Direction	Business operations

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Notes

Andersen Consulting: Service Lines

- Systems management
- Systems integration
- Strategic services
- Change management services

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Notes

Cap Gemini Sogeti

Focus	European domination
Strengths	Geographic coverage Partnership approach
Direction	Developing consultancy capabilities

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Notes

Gemini Consulting

- MAC Group - strategy
- United Research - change management
- Gamma International - organisation and information systems

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Notes

Bull

Focus	Distributed systems, downsizing
Strengths	Public sector Network integration
Direction	Alliances, systems integration

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Notes

Unisys

Focus	Transaction-intensive industries
Strengths	Network integration Financial sector Open systems
Direction	Open systems

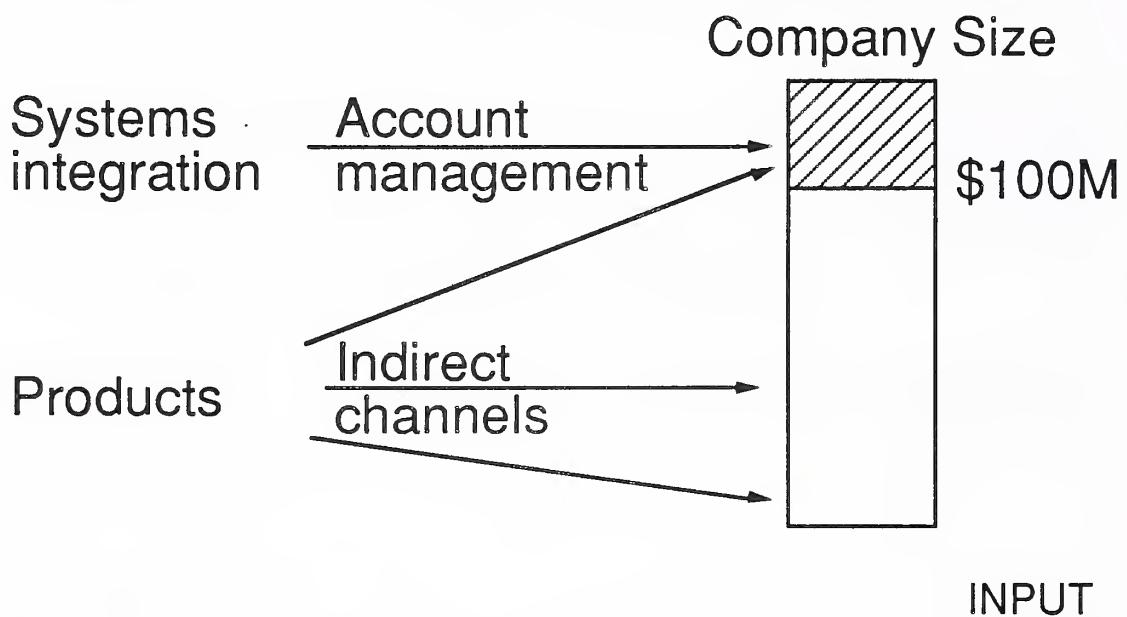
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Digital: Business Strategy



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Management Consultancies

Strengths	Weaknesses
High-calibre personnel	Expensive
Credibility with user top management	Sometimes overrun cost and timescales
Business consultancy skills	Looking for repeat business

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Systems Integration, Europe

Major Equipment Vendors

Strengths	Weaknesses
Stability	Business consultancy skills
High-calibre personnel	Lack of proven track record
Account management	Lack of independence Lack of development expertise/resources

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Systems Integration, Europe

Professional Services Vendors

Strengths	Weaknesses
Relationship with IS management	Business consultancy skills
Project mgmt. skills	Perceived tech. orientation
Implementation/technical skills	Lack of access to user top management

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Systems Integration, Europe

Key Players in Buying Process

Player \ Vendor type	Equip. Vendors	Prof. Serv. Vendors	Mgmt. Consult.
Player			
Client board-level personnel	High	Med.	Very High
Head of IS	High	V. High	Med.
Client middle mgmt.	Low	High	Med.

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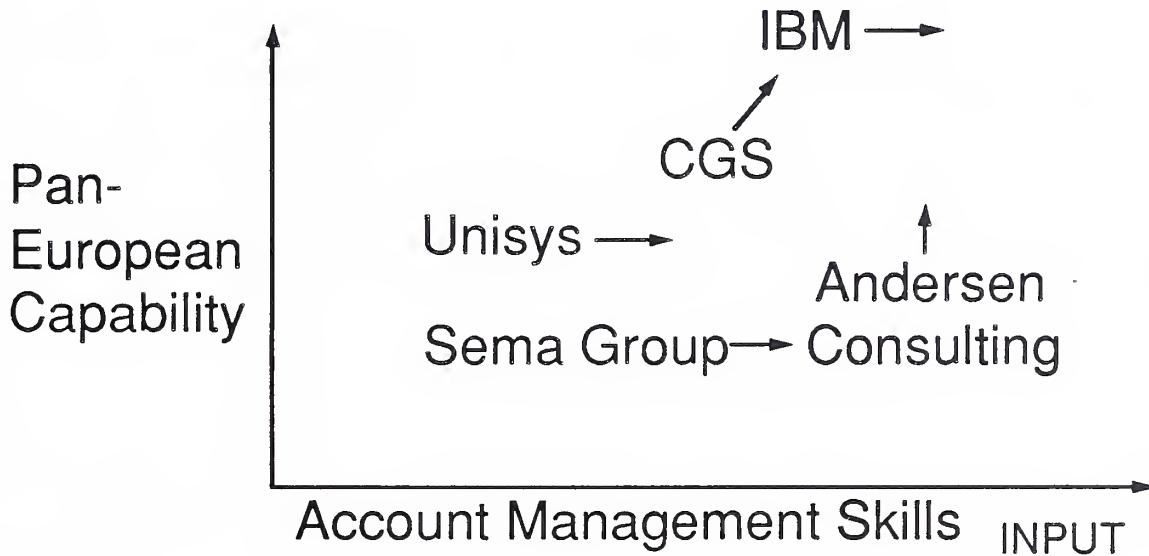
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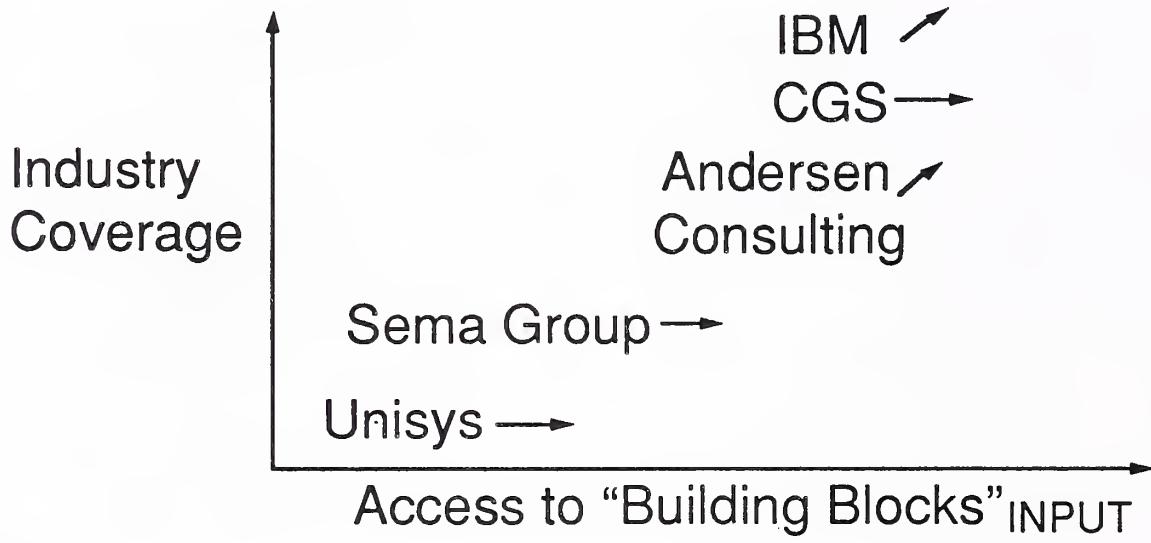
Vendor Positioning (1)



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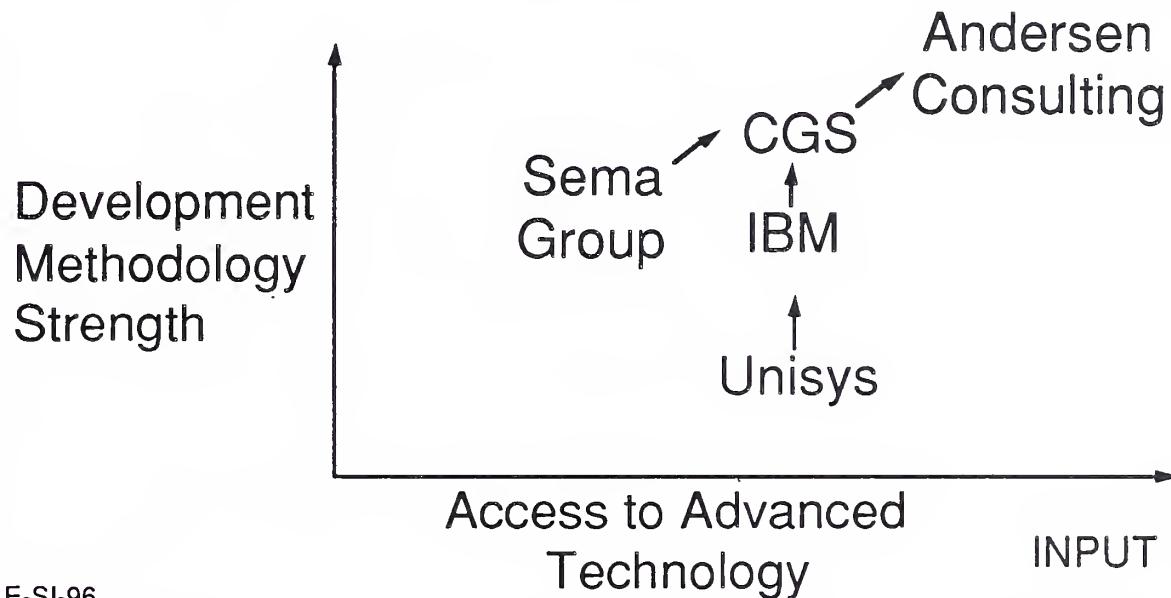
Systems Integration, Europe Vendor Positioning (2)



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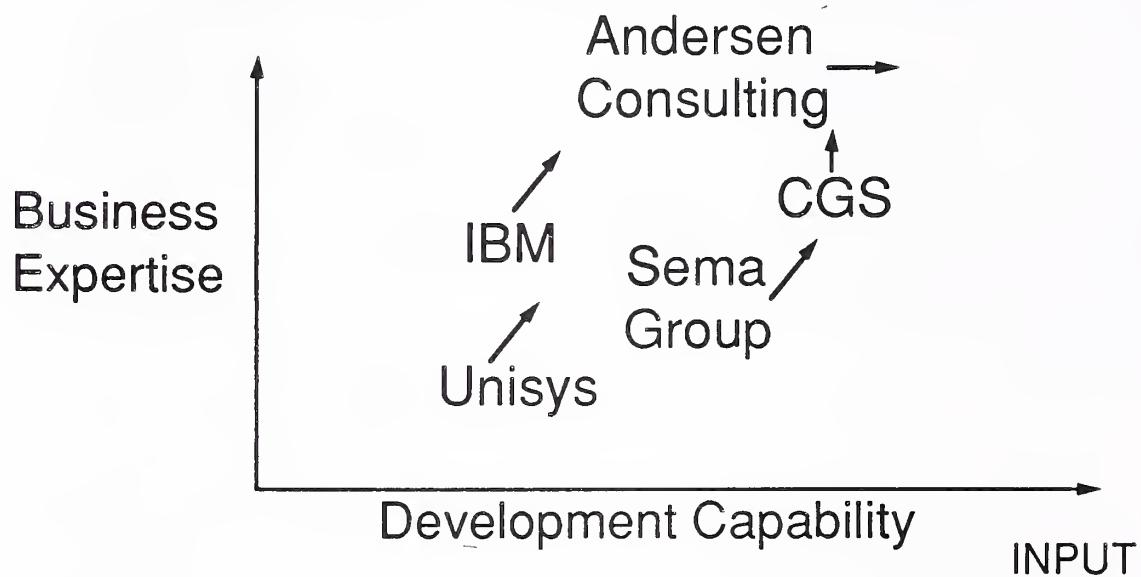
Systems Integration, Europe Vendor Positioning (3)



Notes

Systems Integration, Europe

Vendor Positioning (4)



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